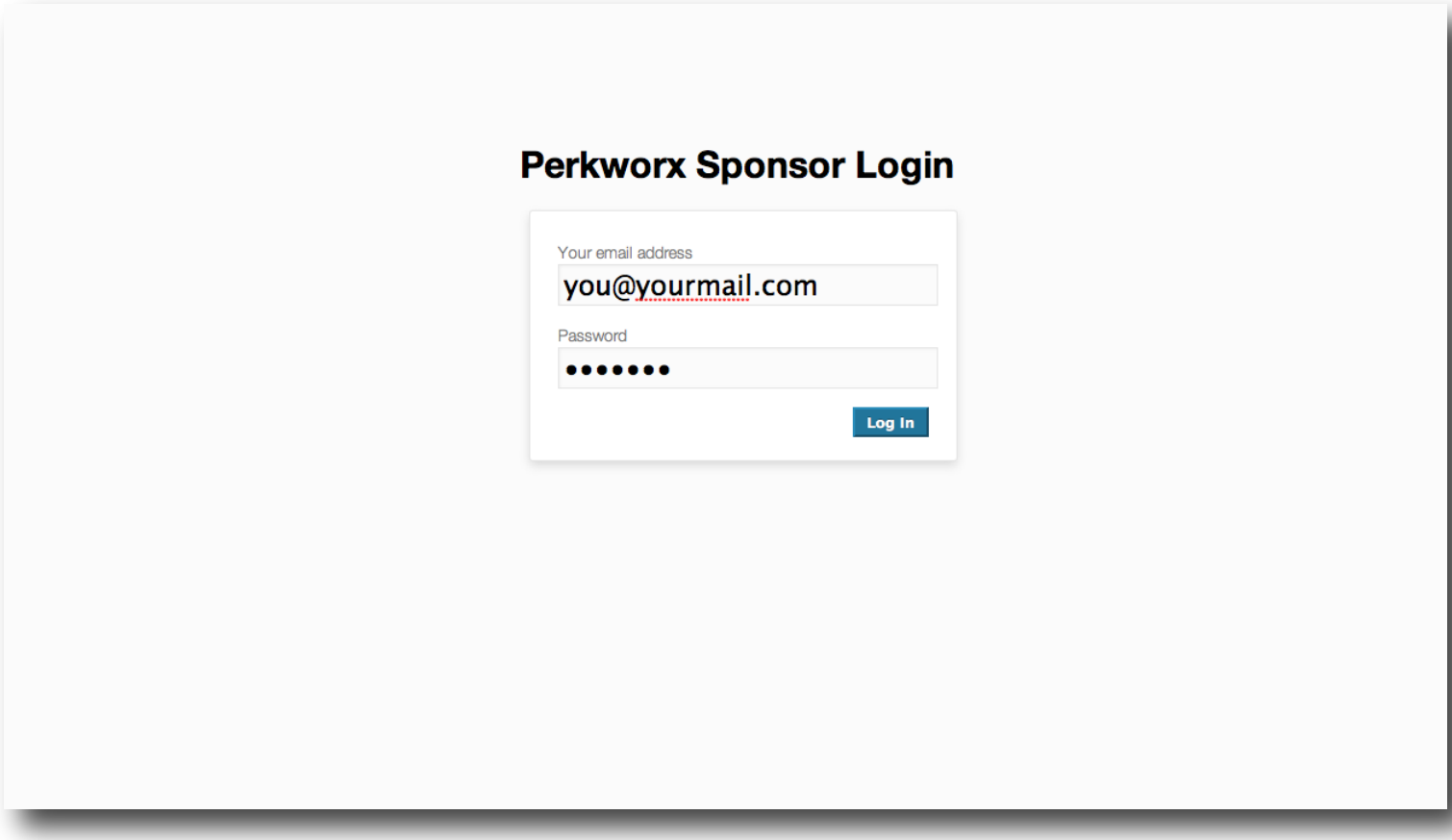
Perkworx

Sponsor User Manual

Logging into Your Account - Step 1

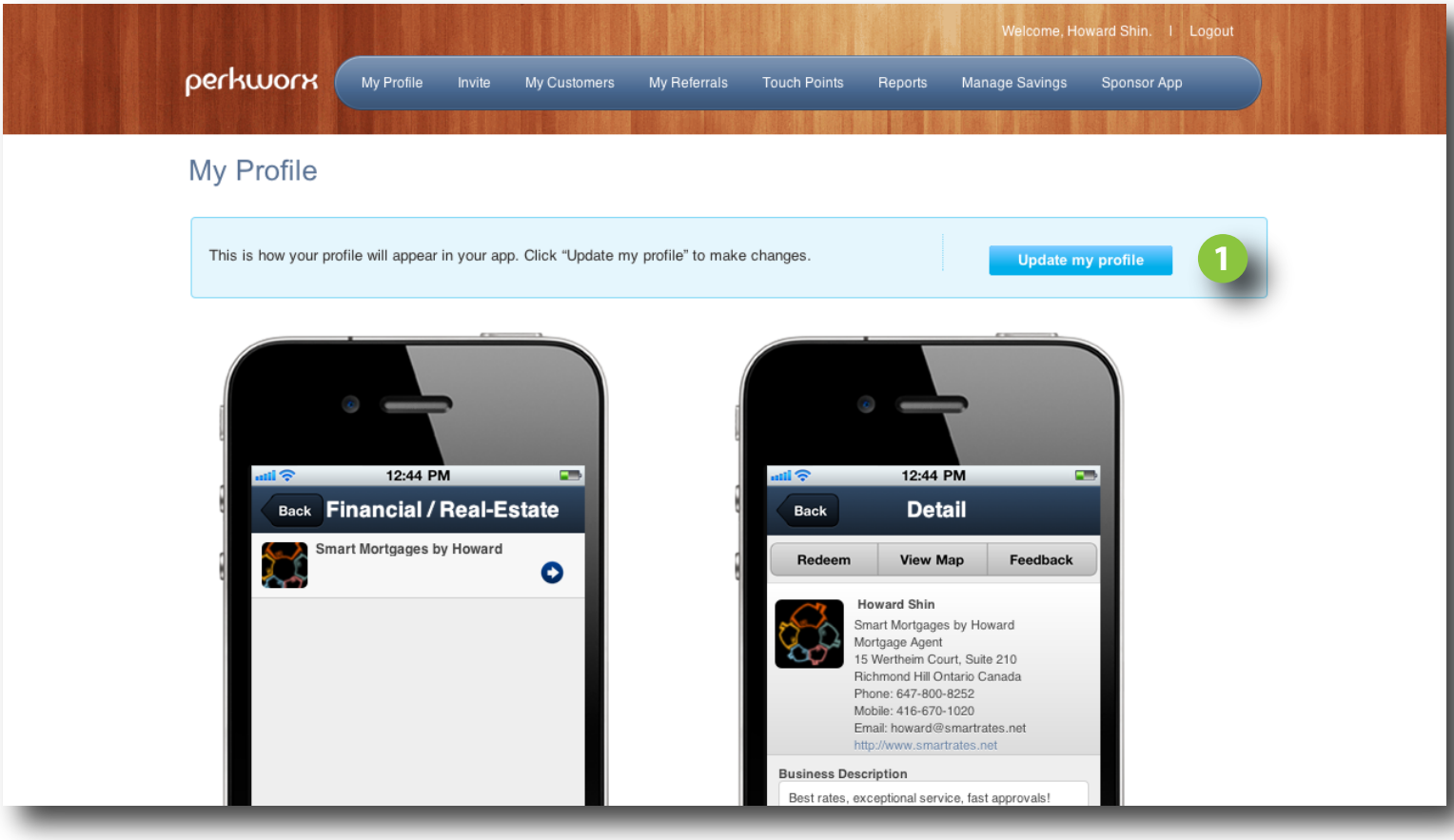
i) Go to www.perkworx.com
ii) Click "sponsor login" link at the bottom of page (#1 above)



Logging into Your Account - Step 2

i) Enter your email address and temporary password
ii) Click "login"

Your temporary password was sent to you along with this User Manual document.

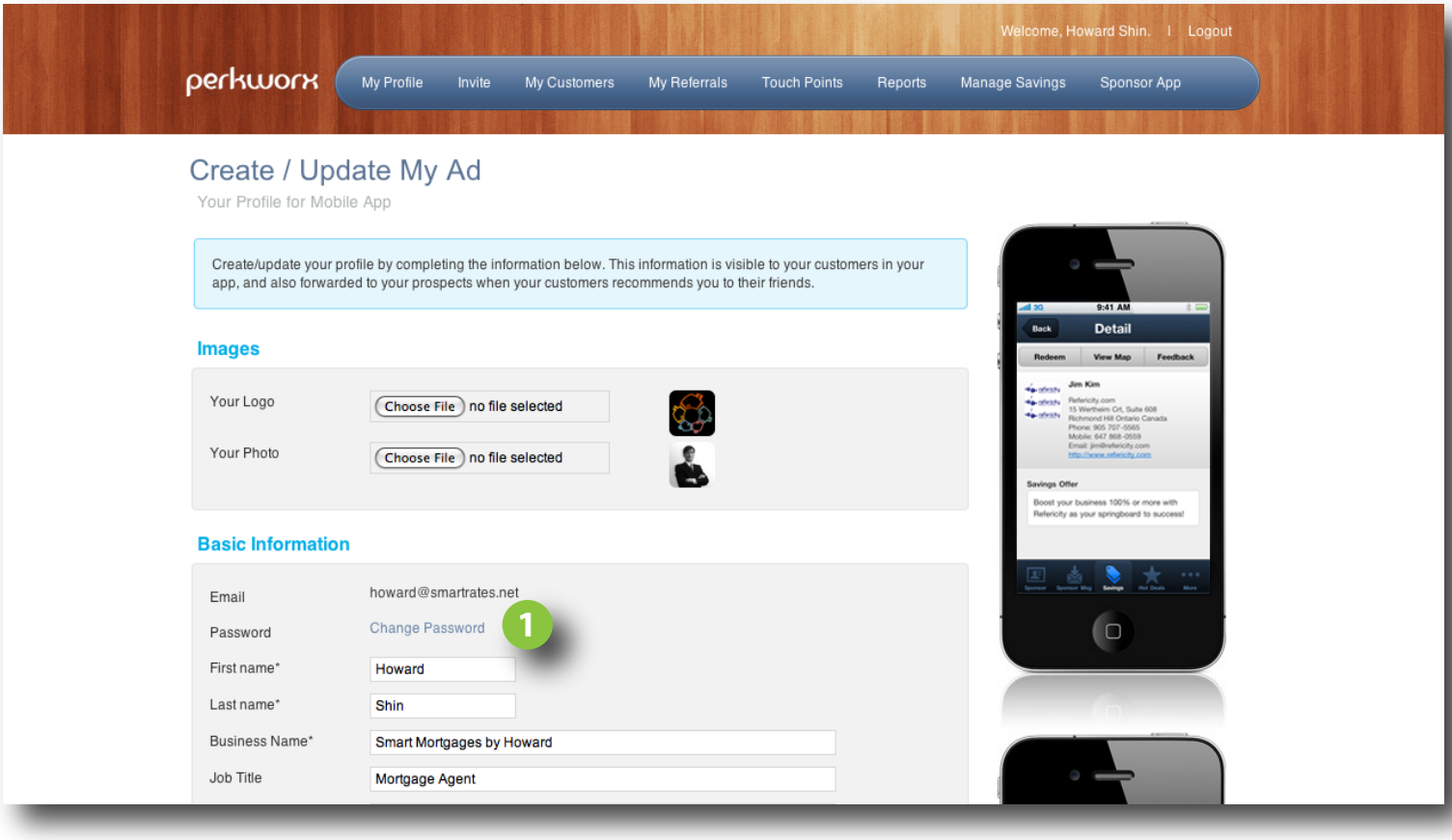


Main Page

Once you log in, you will be brought to this main page. You should see your business information inside the phone image and your name at the top.

First thing you should do is change the "temporary password" to a password only you will know and remember.

Click "Update my profile" button (#1 above) then see next page.

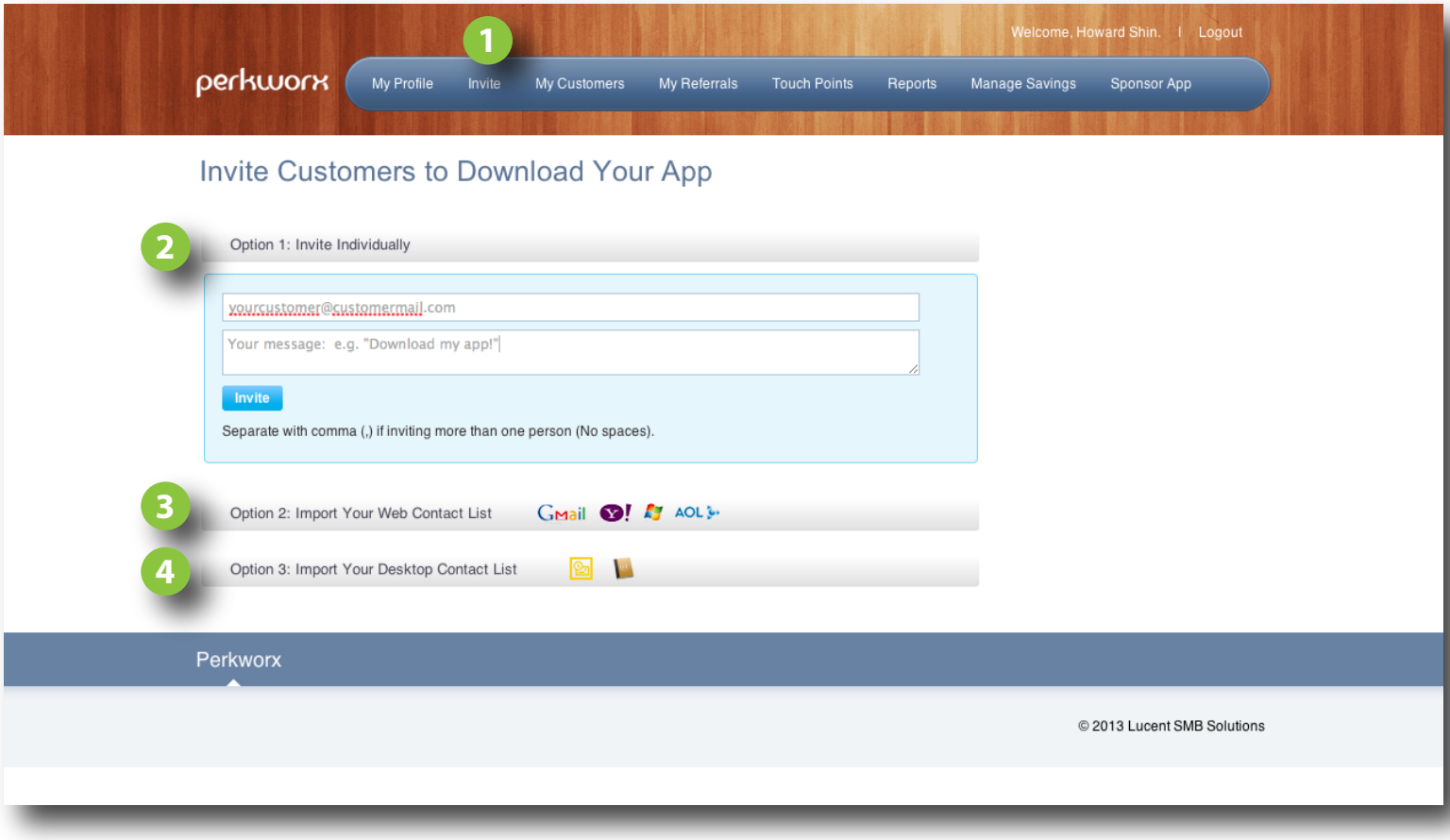


Updating Your Profile and Password

First, change your password to something only you will know and remember. Click "Change Password" (#1 above). This will bring up a new window. Enter your current password (Temporary Password), then enter a new password you wish to use.

Double check all of your information on this page. DO NOT update or change the information in the "Business Promotion" area.

Click "Update profile" button at the bottom of the page to finish.

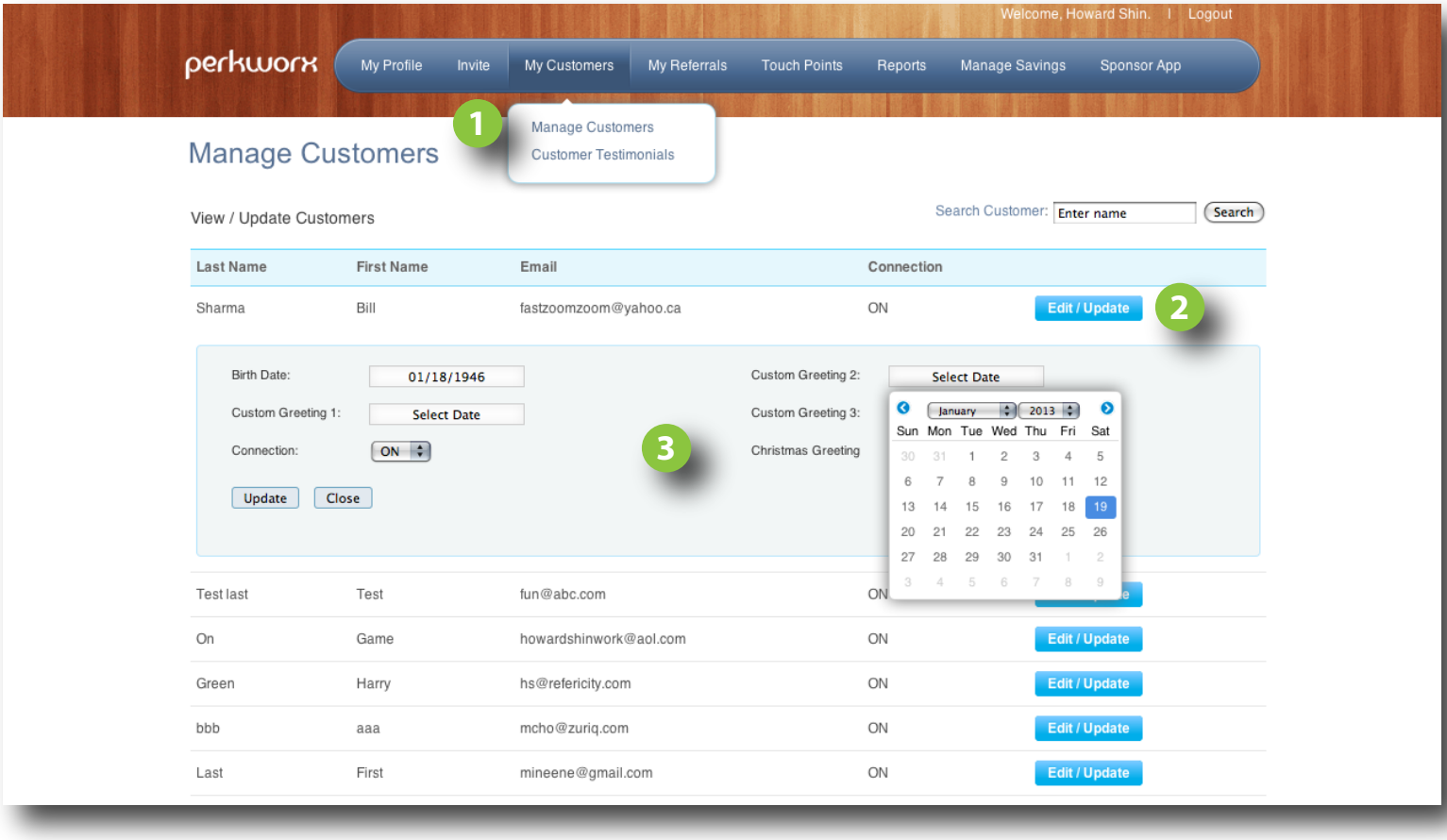


Inviting Customers to Download Your App

Your customers may download your app from Perkworx.com website with just your email address. You may also have "thank you cards" that you can hand out to your customers, which tells them why they should download your app (and how). There are no further action needed from you for these customers.

The invitation tools on this page can be used for those customers you have not given the "thank you cards" to (e.g. Past clients). Or you may want to invite everyone on your contact list all at once.

i) Click "Invite" (#1 above)
ii) Click "Option 1: Invite individually" (#2 above) if you are inviting single person or a small group of people.
iii) Click "Option 2 or 3" (#3 and #4 above) if you wish to upload your contact database to invite everyone at once.



Managing Your Customers

You are notified via email and on Sponsor version of smartphone app whenever someone registers and downloads your app. They are also logged in "My Customers" section and you can update their information so that they receive the right kind of Touch Point emails from you.

i) Click "My Customers", then choose "Manage Customers" (#1 above).
ii) Click "Edit/Update" of a customer you wish to update (#2 above).
iii) Now you can click each of the field in the drop-down are (#3 above) to select the dates you would like them to receive your Touch Point emails

See "Touch Points" section of this User Manual to learn how you can create each type of email.

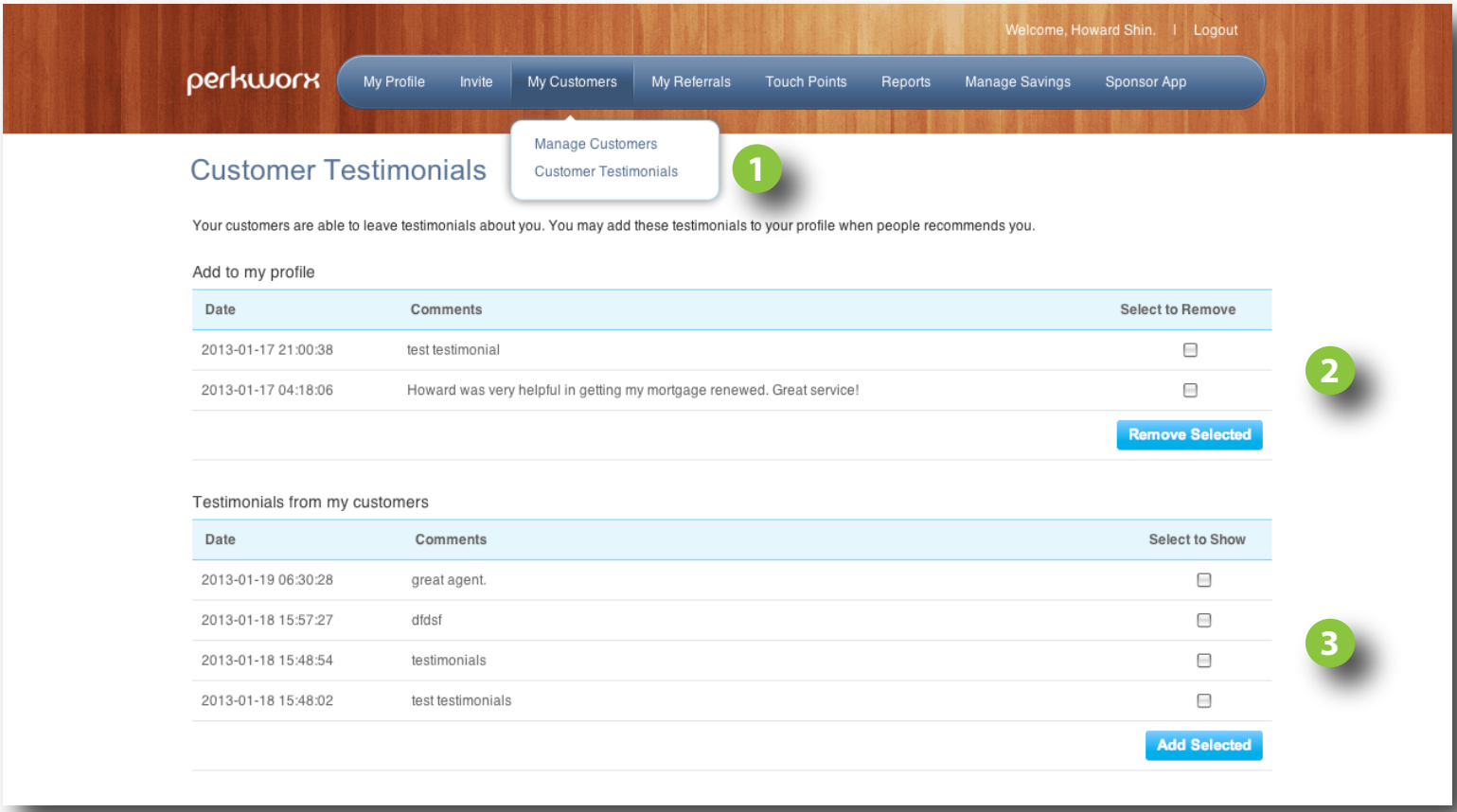
BIRTH DATE: Each customer will automatically receive your birthday greeting card every year.

CUSTOM GREETINGS: There are 3 additional greeting types you can assign. For instance, in Touch Point section you may have created a message for mortage renewal date, one year anniversary of them moving into their home, etc. All you have to do is select the dates you want them to receive those messages.

CHRISTMAS GREETINGS: Christmas greeting card you create is sent to everyone 2 weeks prior to December 25th of each year. Turn this setting to "Off" if you don't want particular person to receive your greeting card.

CONNECTION: Turn this setting to "Off" if you don't want particular customer to receive your Touch Point Communications.

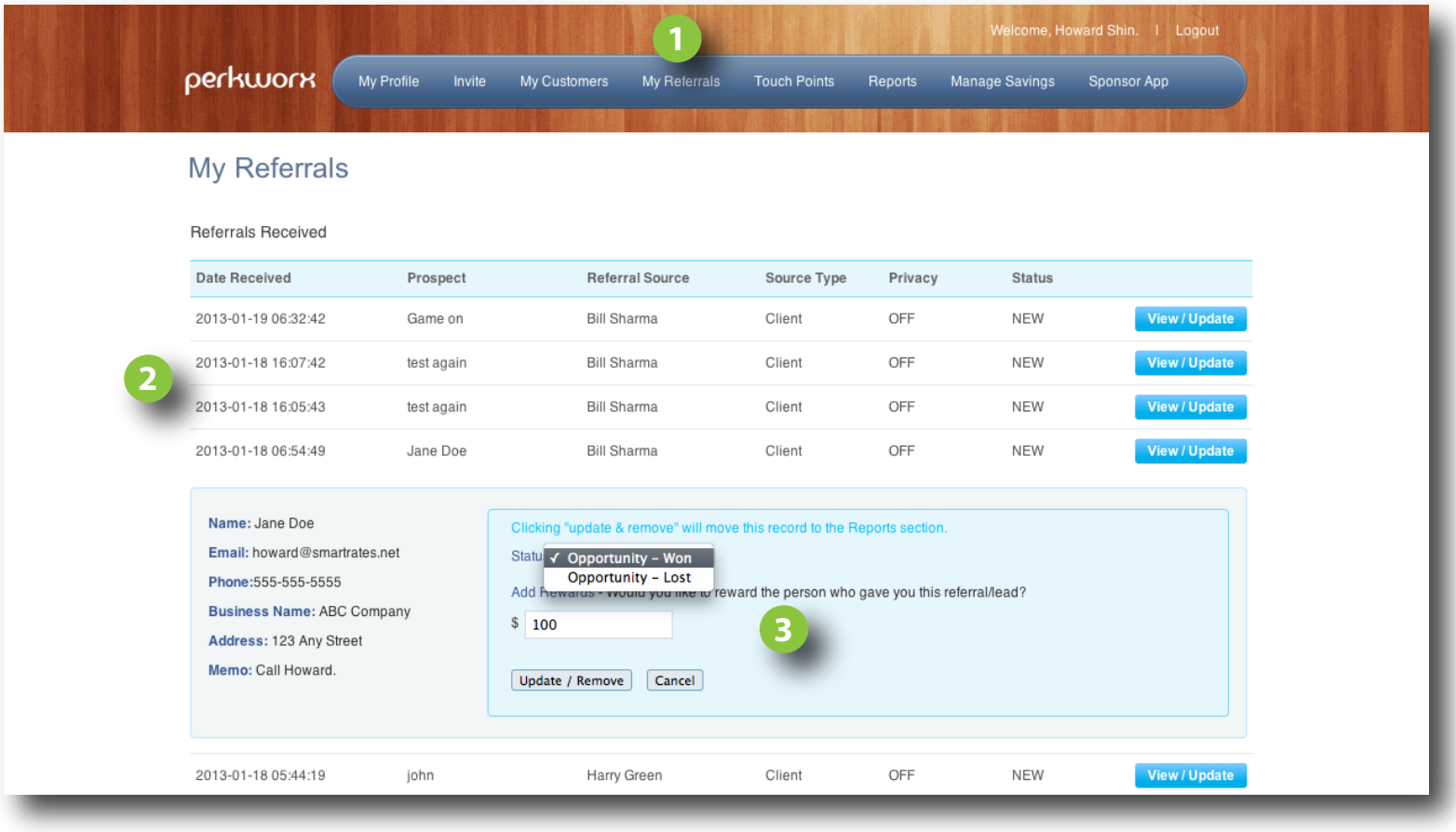
Click "Update" to finish. Click "Close" to close these settings.



Managing Customer Testimonials

Your customers are asked to give a testimonial about your product or service (optional) during their registration. You can add these to your profile so that your prospects (potential customers) can read them when you are recommended by your customer (Testimonials are included in your digital brochure).

i) Click "Customer Testimonials" under "My Customers" section.
ii) All available testimonials are shown at the bottom (#3 above). Select the testimonial/s you wish to include in your profile, then click "Add Selected". Selected testimonial/s are moved to "Add to my profile" section to be included in your profile (#2 above).
iii) If you wish to remove any testimonial/s from your profile, select them from "Add to my profile section (#2 above), then click "Remove selected". Removed testimonials will move to the bottom (#3 above) and will be excluded from your profile.



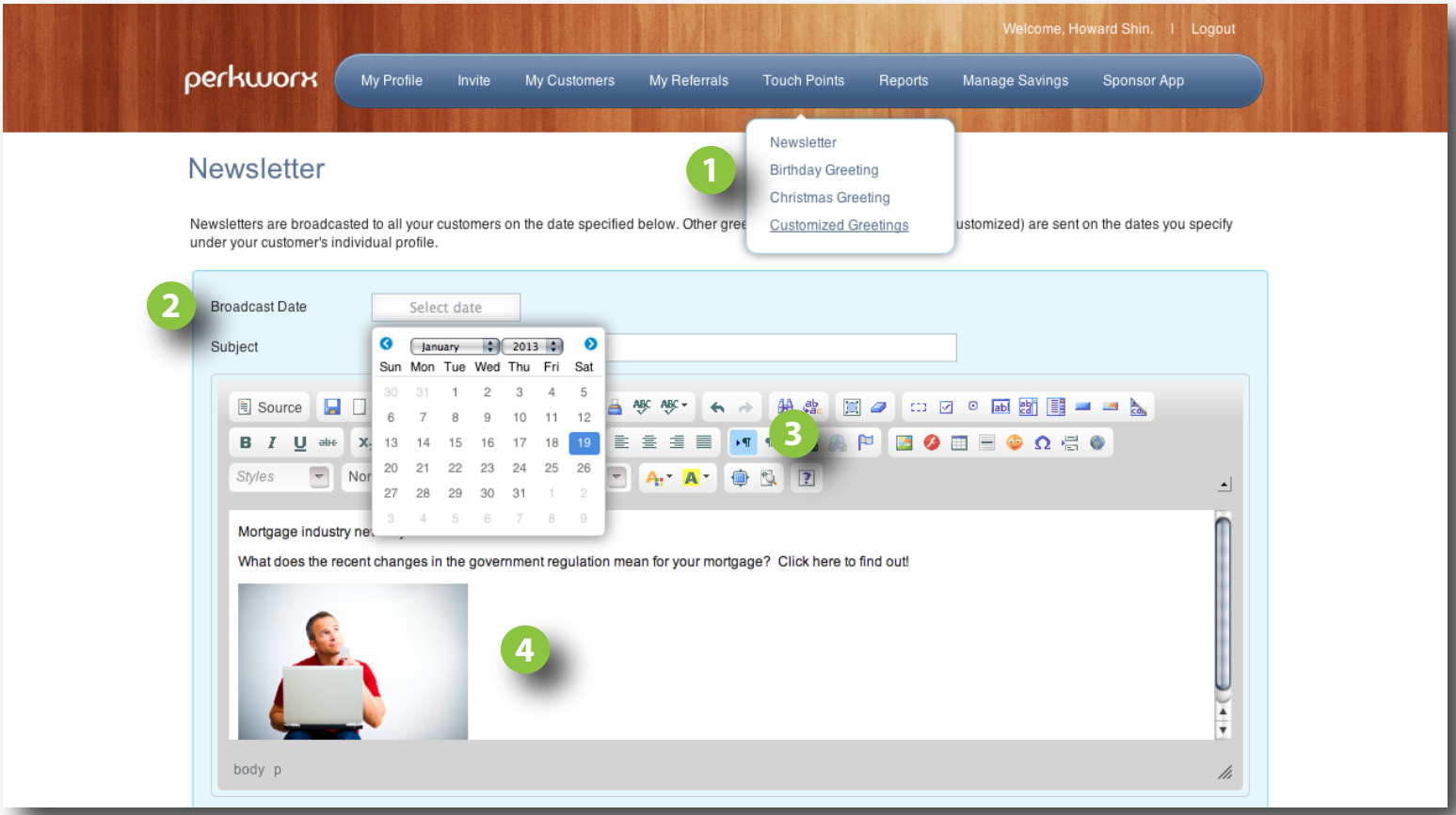
Managing Your Referrals

Referrals from your customers are emailed to you and are also sent to your Sponsor App instantly. These are also logged in "My Referrals" section (#1 above) in the order that it was received. All available details are shown (i.e. Prospect's information, referral source, etc.).

i) Click "My Referrals" (#1 above)
ii) All referrals are shown in the order they were received (#2 above). They are removed only when you click "Update/Remove" (#3 above)
iii) Click "View/Update" to see detail of each referral. If you wish to remove the referral from the list, select "Opportunity - Won" or "Opportunity - Lost", then click "Update/Remove".

NOTE:
If your industry allows, you may add "Reward dollars" to each referral (i.e. Commission for referral). Enter the amount you wish to give (#3 above) to your referral source, then click "Update/Remove". Your referral source will receive a notification telling them that they were rewarded by you. The amount is displayed in your smartphone app for your referral source to view. You can then pay for the reward by any method you choose (e.g. Send them a gift card or cheque).

The actual payment for the reward you wish to give are not handled by Perkworx. You are responsible for sending them the reward amount using your preferred method.

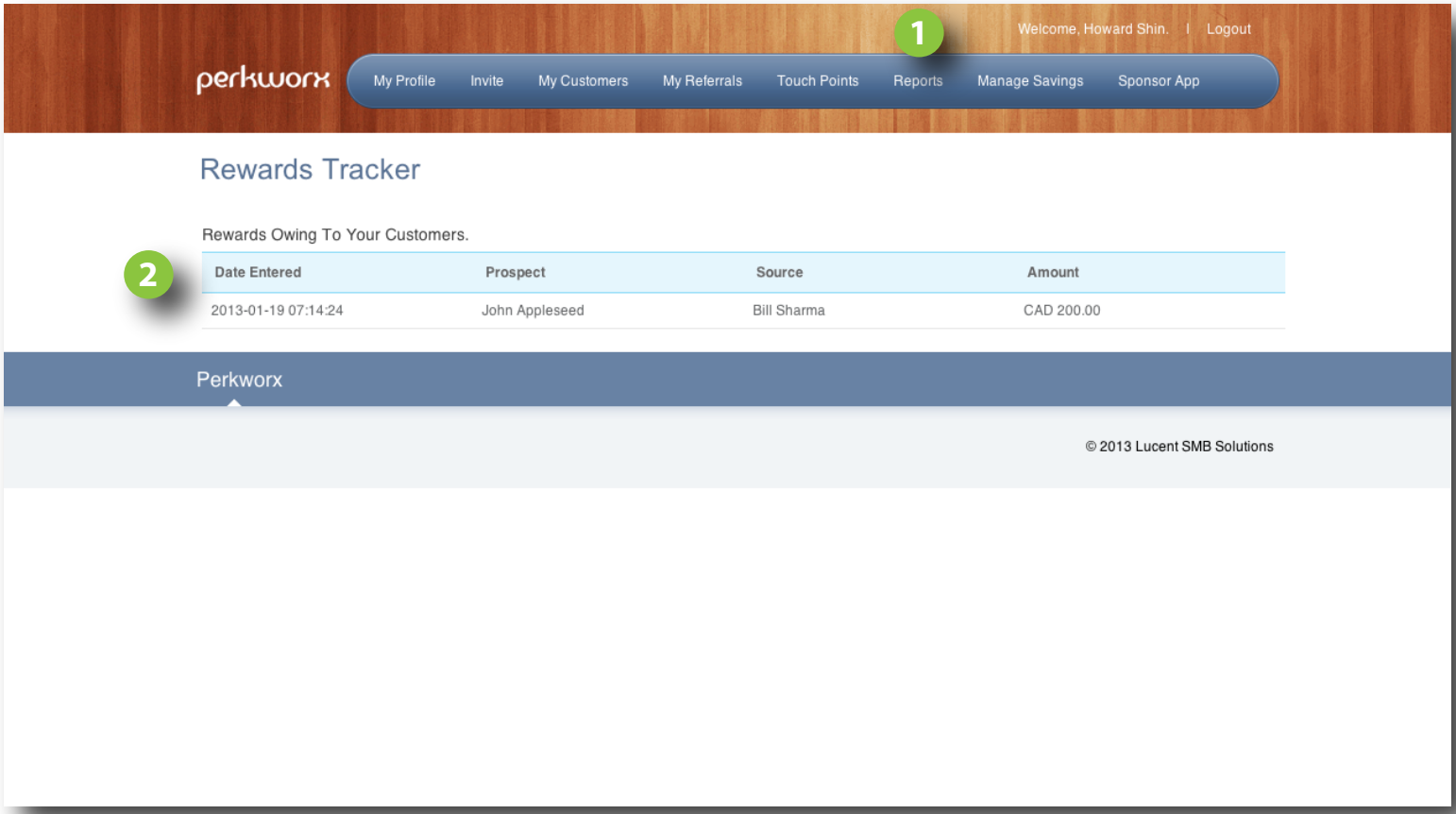


Using Touch-Point Tools

Touch-point tools lets you keep in touch with your customers to remind them about your products and services. You can customize each type of message you wish to create and Perkworx system automatically send them out on the dates you specify.

Transmission dates for birthday greeting and customized greetings must be selected from your customer details since these dates will be different for each customer. Transmission dates for your Newsletters are assigned by you whenever you create a new Newsletter (#2 above). Your Newsletters and Christmas Greeting Card are sent to all your customers unless you disconnect with them in your customer's detail.

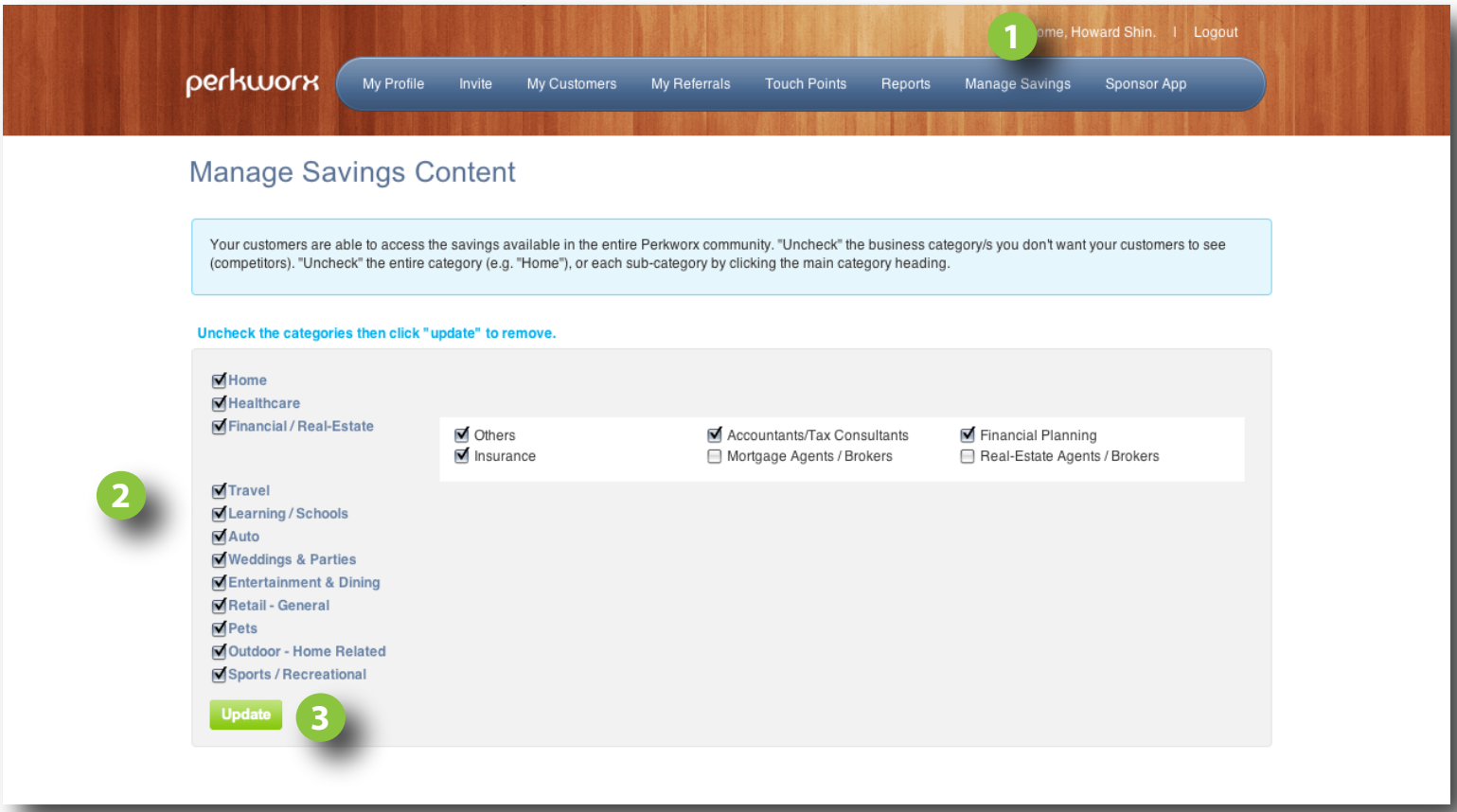
i) Click "Touch Points" from main menu (#1 above), then select the type of message you wish to update.
ii) Use the design tools (#3 above) to create your content. You may also include image files (#4 above).
iii) Click "Update" when finished.



Reports

All of your active referrals are available in "My Referrals" section. Referrals that you close (won or lost) are moved to the "Reports" section. Any reward amount you gave to your referral source are also displayed here.

i) Click "Reports" (#1 above).
ii) All closed referral items are displayed (#2 above).



Manage Savings

Your customers are able to view savings offers from the entire Perkworx community. Your own business category (e.g. Real-estate) are automatically hidden from your customers since you would not want them to see your competitors.

"Manage Savings" section lets you further define what you want your customers to see. For instance, you may want to hide an entire industry or a particular business category. All this can be controlled by you here.

i) Click "Manage Savings" (#1 above).
ii) All checked categories are displayed to your customers. Uncheck an entire industry (e.g. Home) to omit from your app (#2 above).
iii) If you wish to omit a specific business category/s, click the main industry heading, then uncheck each business category you wish to omit.
iv) Click "Update" to finish.

Welcome, Howard
1
Logout
perkworx
My Profile
Invite
My Customers
My Referrals
Touch Points
Reports
Manage Savings
Sponsor App
Because referrals can happen anywhere
The Sponsor App is made just for you. Use it to invite your customers to download your app, get referrals sent right to your phone, plus more!
It works on just about any touchscreen phones or tablet computers. Follow these simple steps to get the Sponsor App on your mobile device!
Profile
Have QR code
BB Smartphone and
iPhones and iPads
Android Phones and

Sponsor App

There is a separate smartphone app for Sponsors (you). This app has many important tools to let you manage your referrals more effectively (e.g. Get referrals to your phone, invite new customers to download your app, etc.).

It works just like other smartphone apps but it runs on any mobile browser. There is nothing to download. You just need to log into it using your phone or tablet's browser. Follow the steps shown on this page (#1 above) to add an icon to the homescreen of your smartphone or tablet!